DOCUMENT Storage Systems

An Electronic Medical Record and Document Management Company

DSS Release of Information Manager

Installation Manual

Version 5.0

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System and Hardware Requirements

Application Server

Minimum - Pentium II Processor: 233 Mhz., 256Mb RAM, 1 GIG Hard-drive available space

Recommended - Pentium III Processor: 500 Mhz., 256Mb RAM, 1 GIG Hard-drive available space

Microsoft Windows NT 4.0 Server or Windows 2000 (Latest Service Pack installed)

Network to Client Bandwidth

Strongly Recommended - Minimum of 100Mb bandwidth SWITCHED from desktops to server.

Training room and Client Workstations:

All client workstations should have the following:

- ✓ Windows NT or Windows 2000
- ✓ 500 Meg Hard-drive available space
- ✓ RPC Broker 1_1 Installed and Hosts Files updated (WINNT/System32/Drivers\etc)
- ✓ *Access to a **high-speed LASER** network printer. This printer needs to be configured, under each ROI users profile, for testing during the installation.

MINIMUM:	233 Mhz	128Mb RAM
RECOMMENDED:	500 Mhz	256Mb RAM

*** A SINGLE ROI REQUEST CAN GENERATE IN EXCESS OF 1,000 PAGES. THEREFORE, THE HIGH SPEED PRINTERS MUST BE ABLE TO HANDLE THIS TYPE OF VOLUME EFFICIENTLY.**

NOTE: You are required to physically check each client workstation and training room workstation, to ensure they meet the minimum system requirements.

Product Installation Procedures

The DSS Product Installation is a three-part process that includes the:

1) Server Install
2) Client PC Install
3) KIDS Build Load and Install into VistA

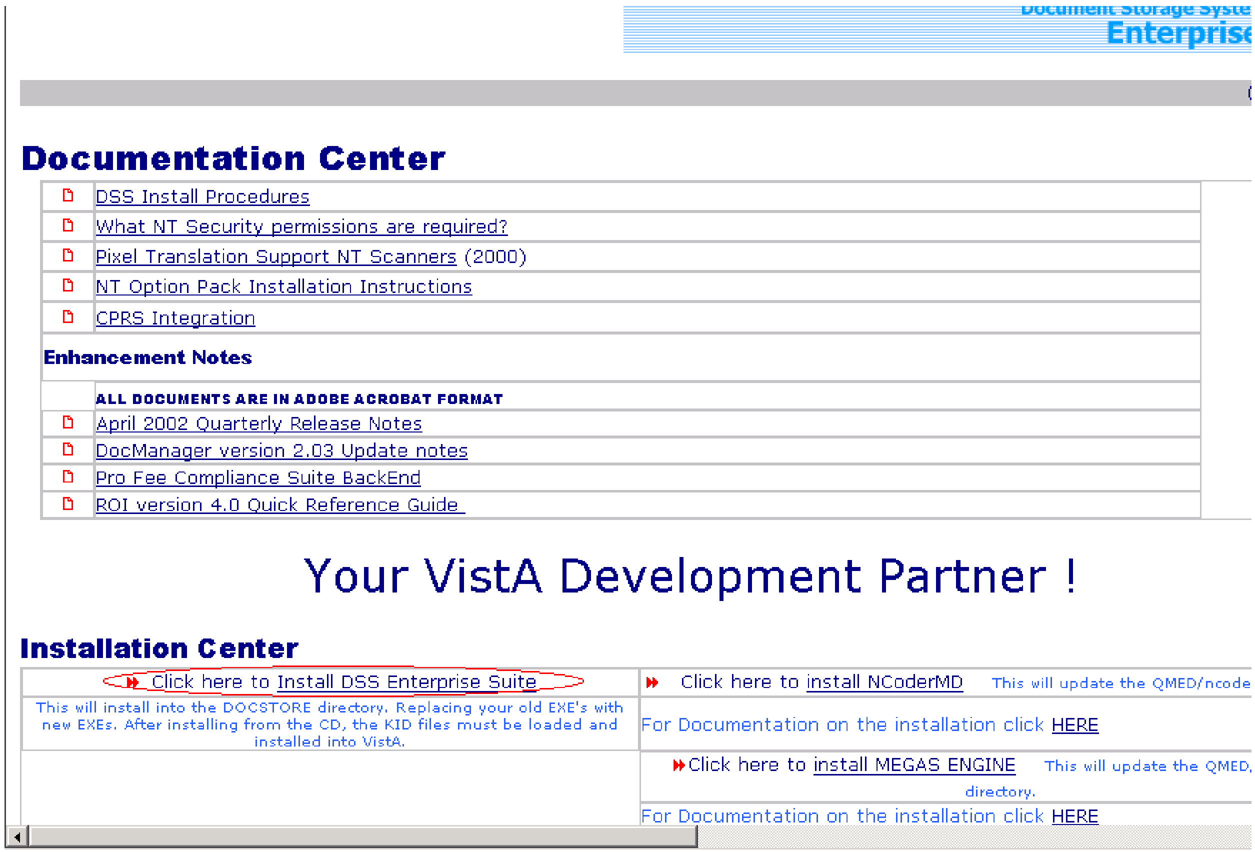
Specific product installation documents can be found in the Documentation subdirectory within the DOCSTORE directory.

Disk File Structure –
Preparatory to the installation of this product, we would need to be sure that there are 2 folders created. One is called “Docstore”, the other is called “Doctest”. Both of these needs to have share permission commensurate with your VISN security policy. The minimum is “Read/Execute” for “Everyone”.

The purpose of these 2 folders is to hold identical DSS applications and files. Should you need to test any “EXE’s”, or “KIDS” against a VISTA system, you can do this using the applications housed in the “Doctest” folder. This will not hamper your regular production users in any way.

The CD you have received contains the latest version of our application(s) purchased by your facility. It is designed to Autorun once inserted into your CD-Rom. The first window that will appear is the:

HTML Window - Click on "Click here to Install DSS Enterprise Suite**"**

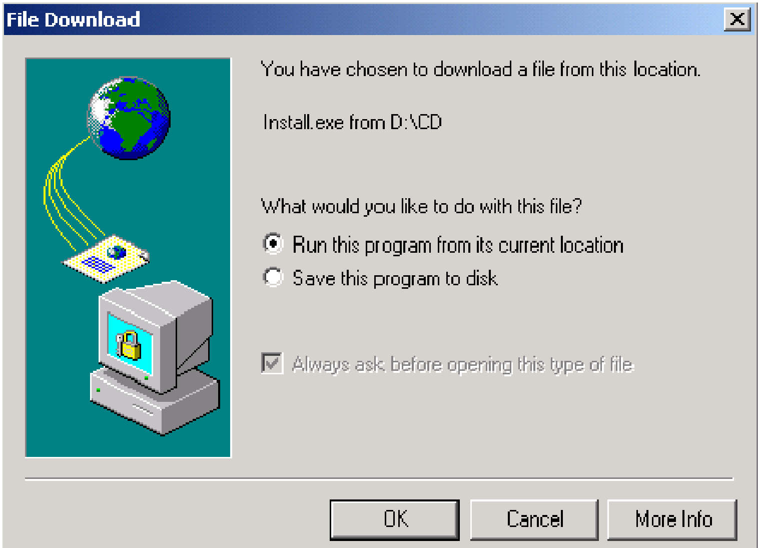


After clicking on Install DSS Enterprise Suite, an installation wizard will begin a series of questions. Please ensure to answer each question.

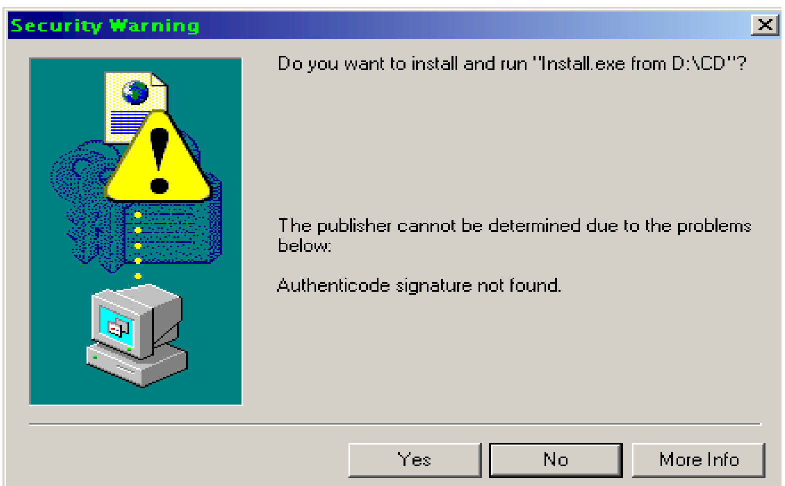
Note: If the product CD does not Autorun, do the following:

- Using your mouse, double-click on **My Computer.**
- Browse your CD-ROM drive and click on **CdInstall.htm.**

1. The first screen that appears is “**File Download**”.

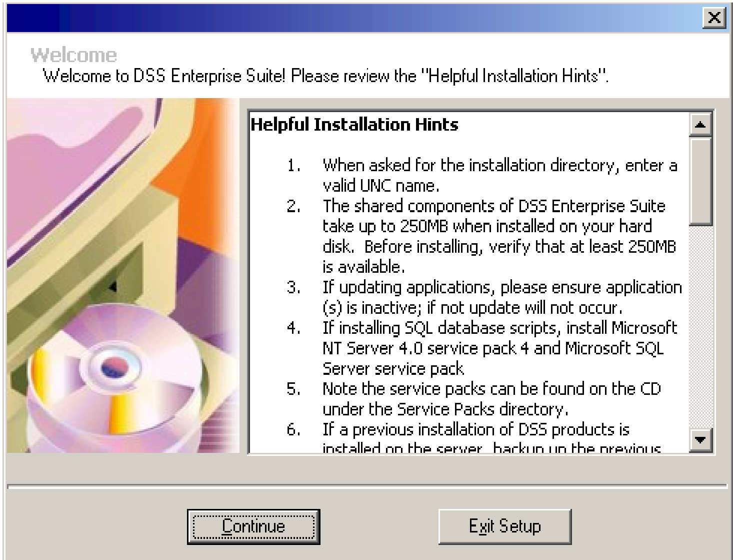


2. Click on “**Run this program from its current location**”.



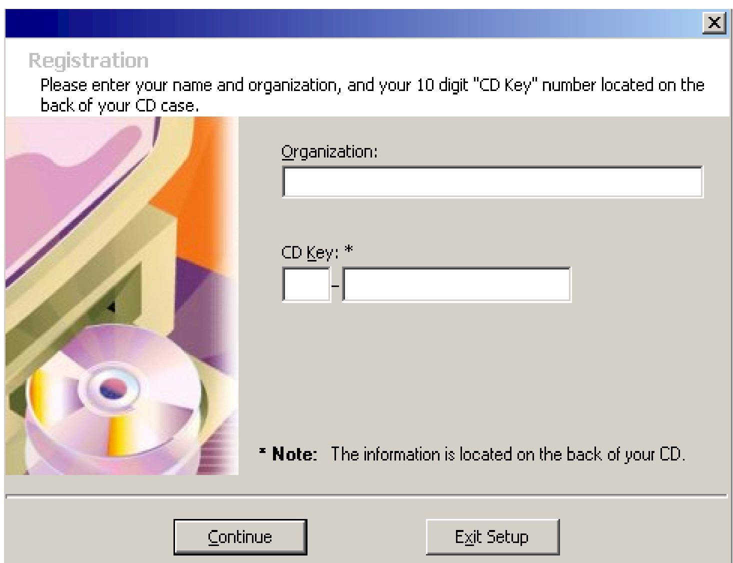
3. Click on the “**YES**” button.

4. **Helpful Installation Hints**



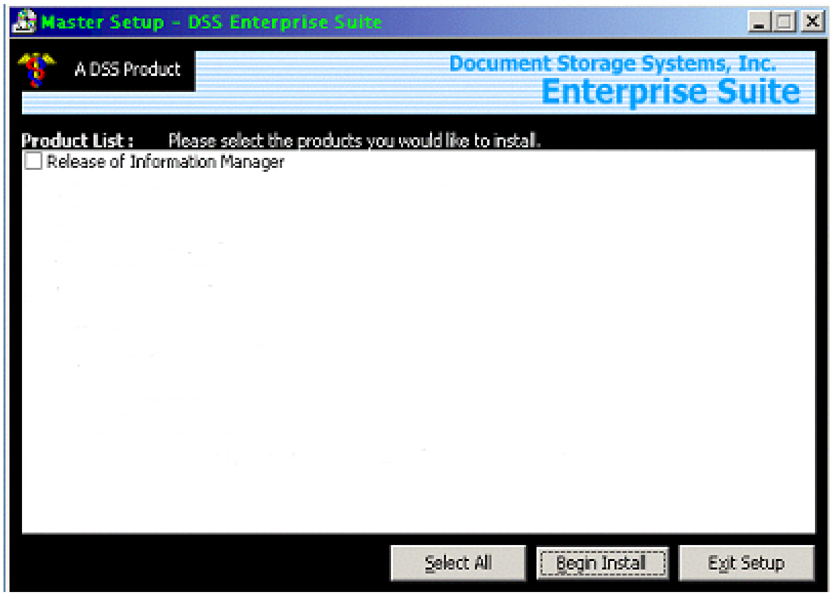
a. After Reading the Helpful Installation hints, click on **Continue.**

5. **Registration Window**



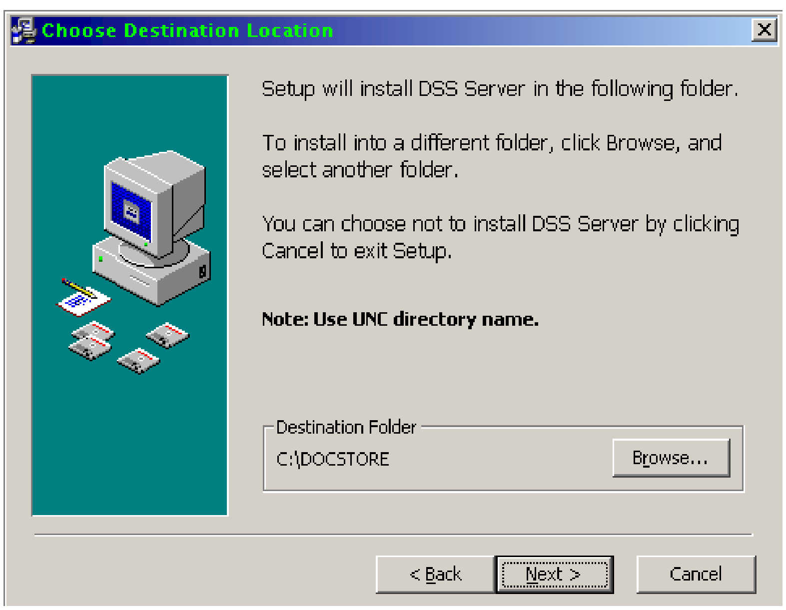
a. Enter the name of the **Organization** as it is printed in the label that is attached to the CD jacket.
b. Enter the **CD key code** as it is printed in the label that is attached to the CD Jacket.
c. Click on **Continue** when you have entered the Organization name and the CD key information above.

6. **Master Setup Window**



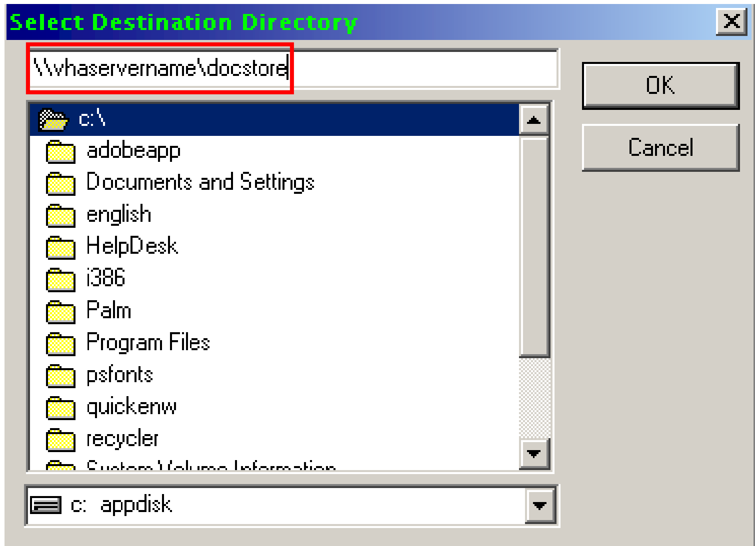
c. Click the check box to the left of the applications name. OR click on the **Select All** button that is at the bottom left of the Master Setup window.
d. Click on the **Begin Install** button when you have selected the application you are about to install.

7. **Choose Destination Location Window**



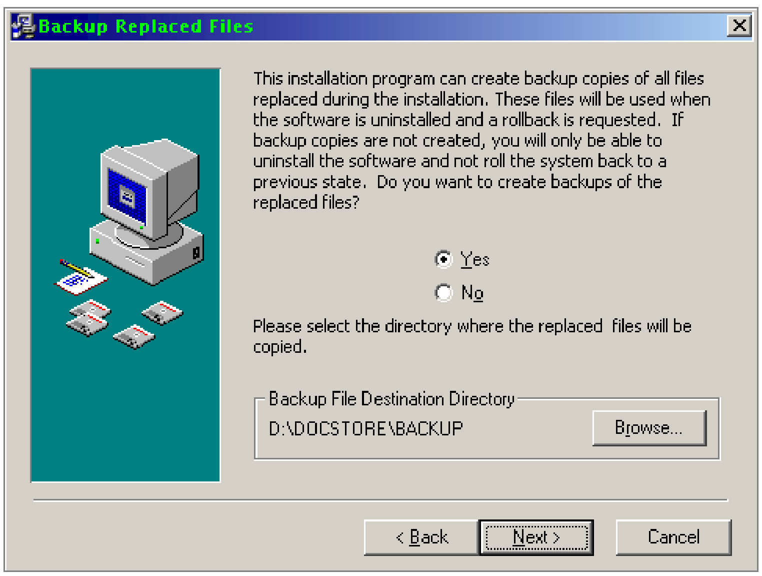
a. The default location for the installation is **C:\DOCSTORE**. We ask that our applications be installed using an **UNC NAMING CONVENTION.**
b. To use an **UNC** convention, click on the **Browse** button.

8. **Select Destination Location (Directory)**



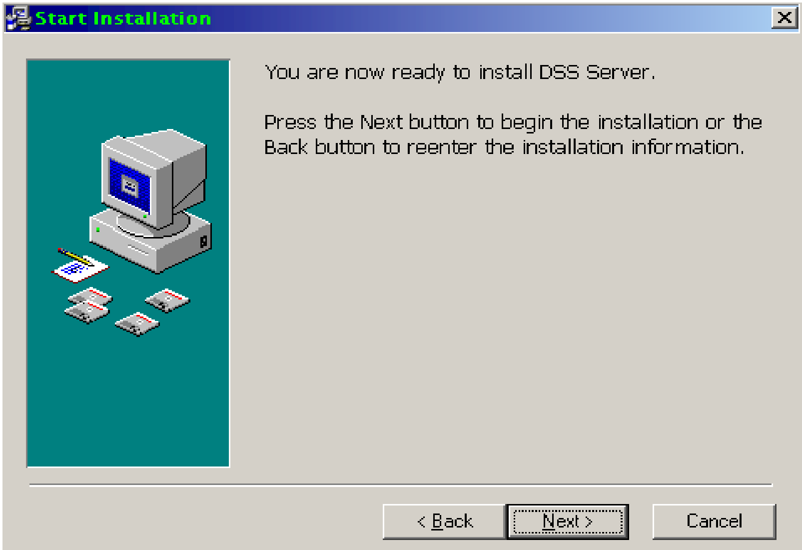
a. Type in the following "\\VHASERVERNAME\DOCSTORE". Click on the **OK** button.

9. **Backup Replaced Files Window**



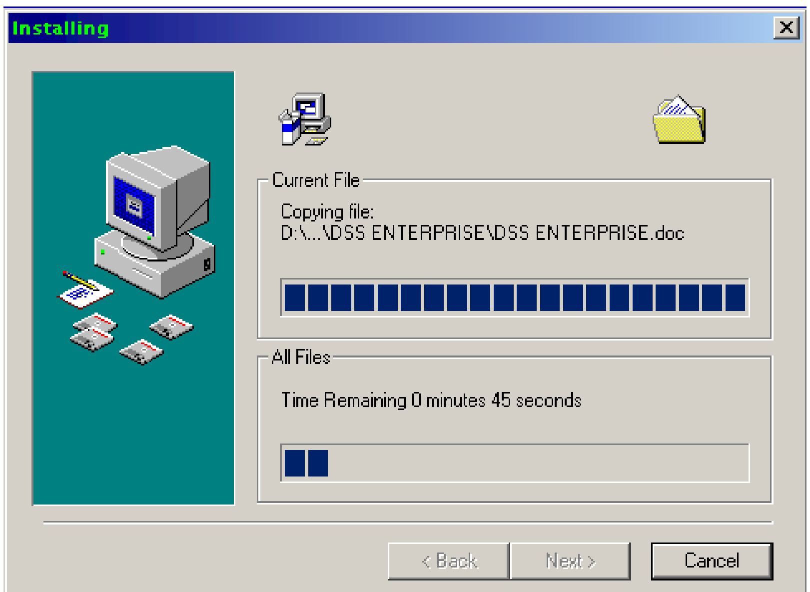
a. As a precaution, we advise our installers to select **YES** and create backup copies of all the files replaced during the installation.
b. Click on the **Next** button to continue with the Installation Wizard.

10. **Start Installation Window**



a. Click on the **NEXT** Button to start the transferring of files.

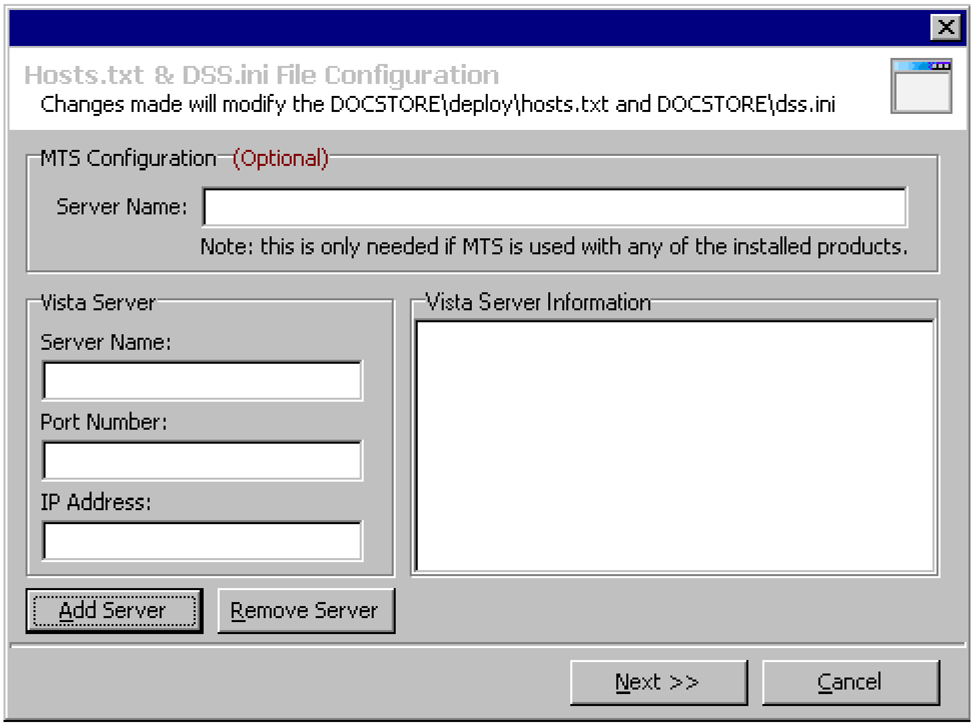
11. **Installing Window**



a. This process will take approximately 5 to 15 minutes depending on the amount of applications that are being installed.

12. **Server Configuration**

Note: Optional screen if installing onto a server without an active Docstore directory.



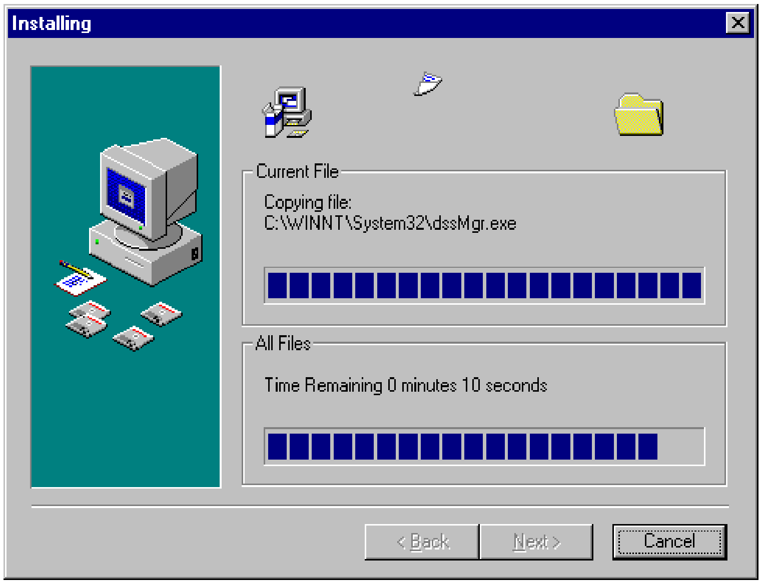
a. In the Vista Server text boxes enter the corresponding information:
   - MUMPS/VISTA Server Name
   - MUMPS/VISTA Port number
   - MUMPS/VISTA IP Address

Your server configuration information is stored in a folder named **"Deploy"** which is located within the Docstore share. The **Deploy** folder contains the Host File Information in a text file named "**Hosts.txt**"**.**

When you are finished entering the data, click on the **NEXT** button.

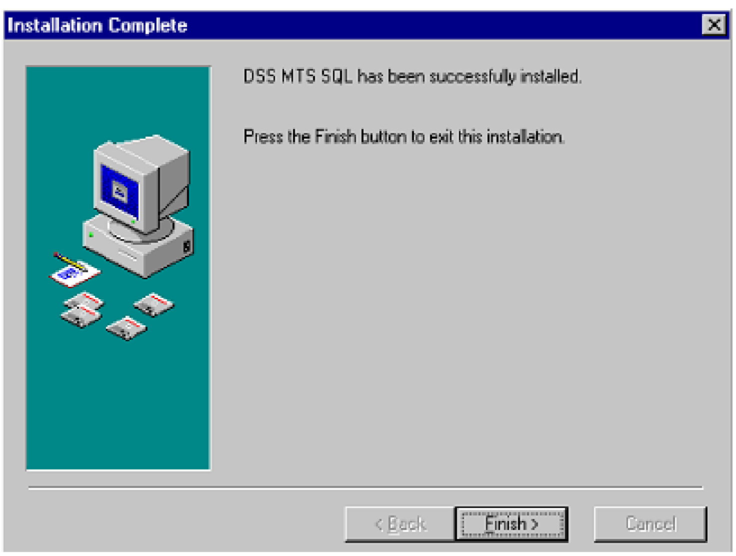
NOTE: The installation process will not continue if any of the text boxes are left blank.

13. **Installation Continuation**



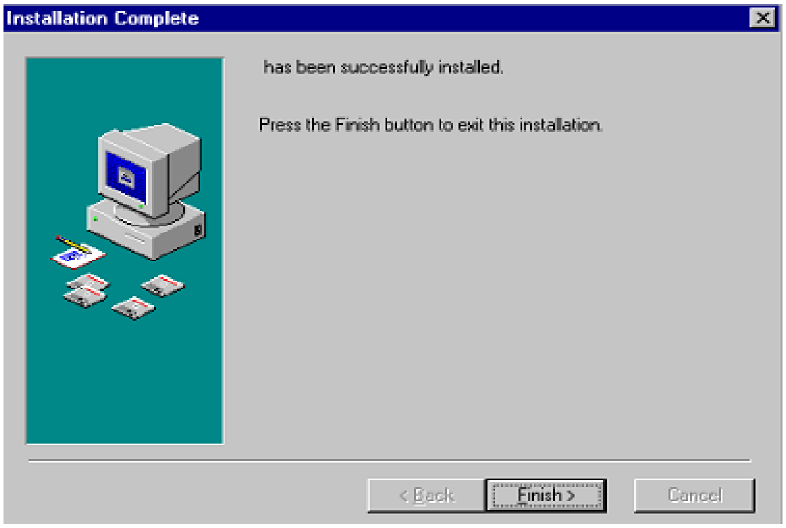
a. The installation process continues.

14. **Installation Complete**



a. Click on the **Finish** button to complete the installation process.

15. **Installation Complete (continues)**



a. By clicking the FINISH button, you would have completed the server installation process. The next window to appear will be **The Master Setup Window**.

b. Click on the **Exit Setup** button and the application will end.

Population of the "Doctest" Folder

Select all the products that presently reside in the "Docstore" folder. Copy and paste these to the "Doctest" folder. Any testing or training that needs to be done can be done out of the "Doctest" folder without disturbing any of your production clients.

Product Installation Guidelines

If the only existing DSS product within the Docstore share is our Dental Record Manager, then we need to make a change to the **DSSEnterpriseManager.ini** file.

Go to the DOCSTORE directory and open the DSSEnterpriseManger.ini file.

The following is how you VISTA section of the .ini file should appear after editing.

;[VistA]
;Option=VEJDWPB CORE RPCS
;Option=VEJDWP DSS DENTAL RPCS
;Option=VEJD ENTERPRISE MANAGER

Permissions
You will need to verify that you have Write permissions, at the minimum, to the ROI.ini, ROI Folder, and the Stats folder. You will need these additional permissions for all users needing to use this program, whether in-groups, or individually accessing the program.

You have successfully completed the server installation of our products. If you have any questions or comments, please feel free to use the contact information below to let us know what you think and how we may serve you better.

NAME	DEPARTMENT	PHONE	EMAIL
Customer Service		(561) 227-0217	customerservice@docstorsys.com
Developers		(561) 227-0207	developers@docstorsys.com
Sales		(561) 227-0207	sales@docstorsys.com

KIDS File Installation and Client Workstation Pre-requisites

DSS ROI Record Manager Mumps Kids Install

After the server installation is complete, three host/kids files will be located within the "KIDS" directory of the "DOCSTORE" share within the application server. The three Host/Kids files are the following: "DSIC_X_X.KID", "VEJDCRE_X_X.KID", and "DSIRI_X_X.KID"
(where '_X_X' is the revision of the KID file)

Note: The MUMPS programmer **must first** load/install the "DSIC_X_X.KID" host file followed by "VEJDCRE_X_X.KID", and finally the "DSIR_X_X.KID" file. If the MUMPS programmer is using FTP to load/install the files, then the files must be in ASCII file format, not in binary.

DSS ROI Record Manager users must be assigned the following secondary menu options:

Option name: DSIR MENU OPTIONS – all users of ROI will utilize this feature.

Security Key: SUPERVISOR (supervisors only)

VA Central Office has assigned Document Storage Systems, Inc. the DSI namespace. All of our RPC Applications use this name space.

We will also need to have a NT/Win 2k Log on Account and Vista Test account created for the installer and trainers to use while implementing this product. The NT/Win 2k Log On account does **NOT** need administrative rights. This account should be the same as your ROI clerk accounts.

Below is the account information we would like created at all facilities prior to our arrival. It is understood that menu options can only be assigned if KID files are sent to you in advance.

NT/Win 2k Account		Vista Test Account		Menu Options and Security Keys
Username	vhadssroiteam	Account Name	DSS Trainer	DSIR MENU OPTIONS
Password	Docstore1!	Access Code	dss1234!	
		Verify Code	docstore1!	
		Signature Code	dss1234!	Security Key - VEJDROI SUPERVISOR
		Multiple Sign-On	YES	

In addition the DSS installer will ask for the ROI users verify code to be cleared in the test VISTA account to ensure their access during training.

Training Room/Client Workstation Testing/Setup

The DSS Installer, accompanied by an IT Computer Specialist with administrative rights to the local machine, will proceed to your training room. The DSS Installer will then proceed to the ROI user workstations to setup and test each workstation as indicated below.

1. Log onto the client workstation with ADMINISTRATIVE rights to the local machine.

2. Verify the workstations meet system requirements.

3. Browse to the DOCSTORE directory. You will be prompted to log onto the domain – use your NT account information (vha19\vhagrjXXXXXX – then your password).

4. Right mouse click on Start.

5. Click on Explore All users.

6. Browses to and open All users\Desktop. **You will need to either split the window, size or move both the DESKTOP window and DOCSTORE window so you can see both.**

7. Go back to the DOCSTORE folder.

8. Right mouse click and drag the DSSROI.exe to All users Desktop.

9. Release the mouse.

10. Click on Create shortcut here.

11. Log off and have the user sign on with his or her NT logon. If the user is not present then log on with an NT account that is equal to the permissions given to the ROI users.

12. Execute the ROI shortcut.

13. **VA Employees (ROI User) -** Log into Vista (live and test accounts) to test connectivity and verification of menu options being assigned and Vista Test Account codes begin cleared for training. ****NOTE:** Users will be instructed to enter their Live Account Verify Code when creating a new Verify Code.

14. With the assistance of the DSS Installer we will verify, from a testing script, that ROI is properly functioning on each workstation and the ROI report can be printed.

If the VA Employee, ROI User, is not at his or her workstation the **DSS Installer will:**

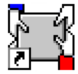
1. Log onto the workstation with his/her NT Log on Account Vista.

2. Log into Vista (test account) to test connectivity and verification of menu options being assigned.

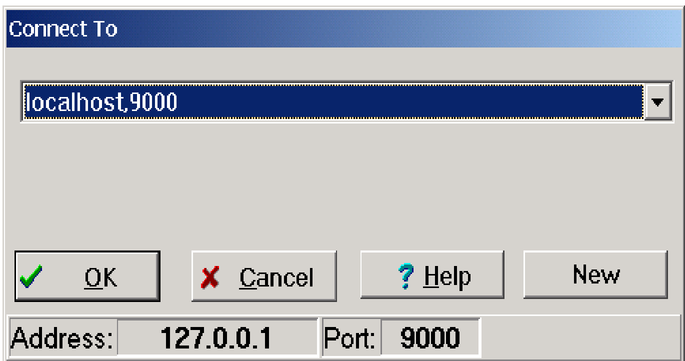
Verify, from a testing script, that ROI is properly functioning on each workstation.

Testing Release of Information Manager

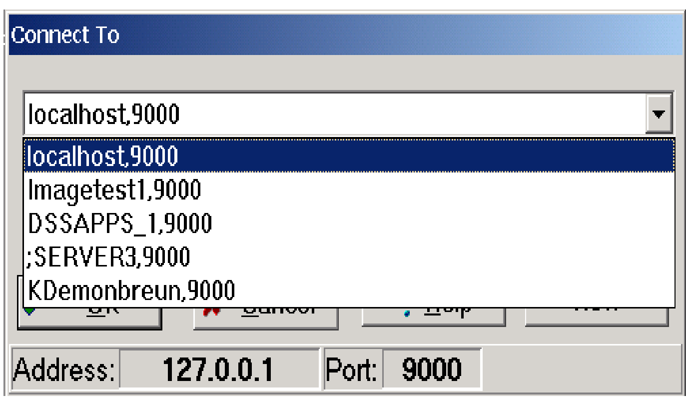
To Access DSS ROI Manager:

- Double click on the ROI Manager icon  located on the desktop.

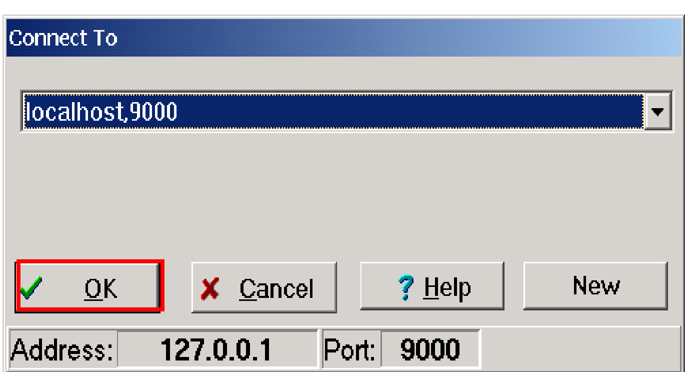
Depending on the manner in which your Administrators have provided users access to your production and test accounts, you may receive a “**Connect To**” screen prior to the “VistA Sign on” screen.



If you receive a “**Connect To**” screen, you would simply select either your Production Account or Test Account depending on which account you want to work in (via pull-down arrow).

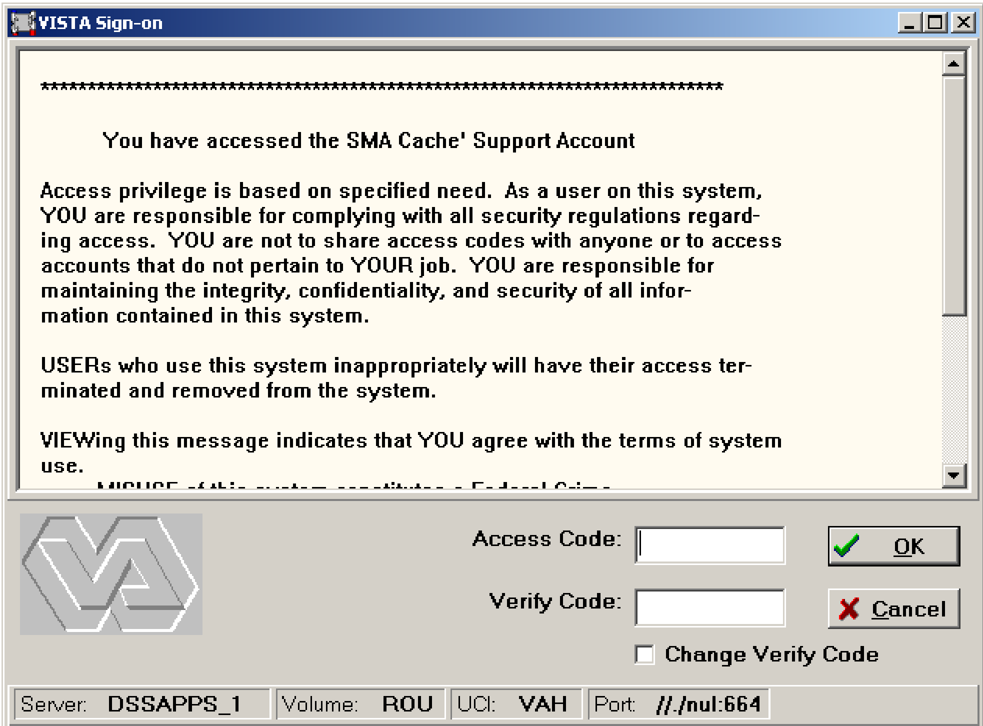


Once you have selected the appropriate account, click on the OK **button.**



VistA Sign On

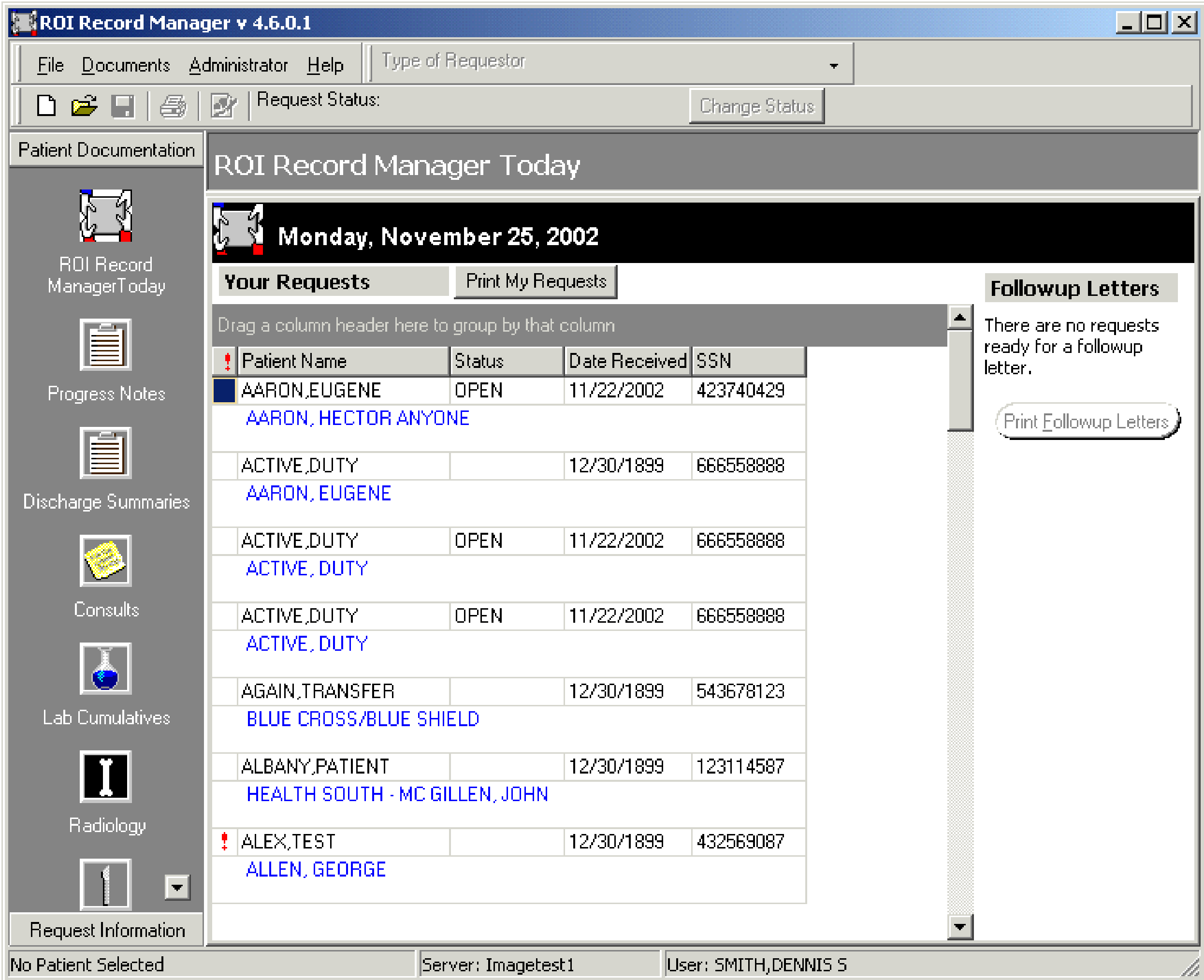
The following VistA Sign On screen **will appear as illustrated below. Users must log on to VistA in order to use the ROI application.**



To Log On to VistA:

- Type in your Access Code as provided by your administrator.
- Press the **Tab** key on your keyboard.
- Type in your Verify Code as provided by your administrator.
- Click on the **OK** button.

The following screen will be displayed.



Click on the "Administrator**" drop down menu. Choose the** facility data **option, fill it out entirely and save.**

Appendix A – Testing Reference Guidelines

Creating a New ROI Request

Click on the "**New**" icon **OR** Select the "**New ROI Request**" option from the "**File**" pull-down menu.

The "**Create a New ROI Request**" wizard appears.

Enter the first few letters of the patient's last name. Press the Enter key or click on the **Search** button to locate the patient.

Click on the desired patient. Click on the **Next** button.

To assign a clerk to the request, either remain with the default (your name) or conduct a new search and select a different ROI clerk's name.

Click on the **Next** button.

Choose the Requestor type, Authority for this request, Type of this request and Reason for this request (pull-down menu).
Note: See Matrix on back of the actual quick reference guide.

Choose the ROI Request Priority (radio button) from Normal to High.

Click on the **Next** button.

Select the requestor for this request and edit the requestor's demographic information if necessary.

- Edit the requestor's demographic information

Or:

- **Add a New Requestor:**

- Select the **Add New Requestor** button.
- The **Add a new requestor** screen will appear.
- The requestor can fall under three categories to choose from such as:
  - Patient Name
  - Insurance Company
  - Other
- Fill in the appropriate information based on the category selected.
- Select the **OK** button.

Click on the **Next** button.

Choose the appropriate check boxes for printing of the VA-5345. Provide any additional comments.

Click on the **Next** button.

If your request is completed, click on the **Finish** button.

If you wish to set the date ranges for your request, click the **Next** button and enter the date ranges as necessary.

After selecting Finish, the request will display. Select documents requested for release. Move documents from "available documents" column to the "documents to be released" column.

- Select document, drag, and stop, or
- Select document, and select "Add selected", or
- Select "Add all"

Closing A Request

At the top of the program, use the mouse and point to the "**Request Status: CLOSED**" bar.

On the left side of the window, click on the **CLOSED** option.

On the right side of the window, choose one of the following options:

- Granted = Request completed - All information requested was provided.
- Partial Granted = Request completed - Only part of the information requested was provided.
- Denied = Request closed - NO information requested was provided.

This will change the status of the request to "**CLOSED**".

Opening an Existing ROI Request

Click on the "**Open**" icon located on the toolbar OR:

Select the "**Open ROI Request…**" option from the "**File**" pull-down menu.

The "**Open a Current Request**" window appears.

Select which types of requests you wish to view (pull-down menu):
- **Lists -** all, open, pending, closed, denied, cancelled, error.
- **Requests -**
  - For a Patient - requires patient identifier (3 letters).
  - Worked by a Clerk - requires clerk identifier (3 letters).
  - Open or Pending.

Using patient or clerk name, enter at least 3 letters, press **Enter** or select "**Search**". Search results will display based on the search criteria. Select the desired patient/clerk name.

Select the desired request. Click on the **OK** button to select the request.

Or to view Disclosure Summary select "**Show Acc. of Disclosure Information**" button

Printing a ROI Request

Note: A request must be opened to print.

Click on the **Print** icon OR:

From the "File" pull-down menu:

- Select the "**Print ROI Request**" option.

On the left side of the window, select the **Closed** option.
On the right side of the window, choose one of the following options:

- Granted – Request completed – All information requested was provided.
- Partial – Request completed – Only part of the information requested was provided.
- Denied – Request closed – No information requested was provided.

This will change the status of the request to "**Closed**".

The ROI "Print a Request" dialog box will appear.
Select the documents that need to be printed, such as:

- SF544
- Cover Letters
- Delay/Transferal
- Patient Notification
- "Copies of electronic documentation" **must** be selected to print the requested documents.

Select the **Print** button.

The "**Optional Text to Print**" dialog window appears. Select the appropriate request (s) if necessary.

Select the **OK** button.

The "Report Setup" window appears. Here, a user can:

- Select the printer option to print.
- Select the preview option to view.
- Save the file on the computer's floppy or hard disk.

Select the **OK** button.

Note: By clicking on the **Setup** button, a user can choose:

- a specific or the default printer.
- the paper size and source.
- the paper properties.

Editing an ROI Request

From the “ROI Record Manager Today” screen, open an existing request.

Select the **Request Information** button located on the left side of the tool bar.

The following functions are available

- **Patient and Requestor Information:**
  View Patient and Requestor Information
- **Request Settings:**
  Edit request settings
- **Comments:**
  View comments from form 5345 or add internal comments
- **Edit Date Ranges**
- **Create SF544 form**
- **Show Accounting Disclosure Summary**
  View or Print the Disclosure Summary